HR Course Syllabus and Key Notes

WADM1089

Workforce Administration

Classroom Protocol

1. *Attendance*
2. *Housekeeping and Facility Rules*
3. *Introductions*
4. *Classroom Activity Overview*

New Definitions

Legacy Terminology	**Edison Terminology**
Appointment Type	Officer Code
Civil Service field	Reg/Temp field
Contract Worker	Contingent Worker
Department	Business Unit
Division+Cost Center+Other Financial Info	DeptID
Job Class	Job Code
PCQ	PCR (Position Change Request)
Probation	Job Function
Sequence Number	Position Number
Social Security Number	National ID
Volunteer	Person of Interest
Work Unit	Union Code
Retirement Type	Empl Class

Module Discussion(s)

The Workforce Administration course will cover the role HR plays in the hiring and ongoing maintenance of employee records within Edison. The information discussed in this module will include understanding how the current HR business processes will change when processed through Edison.

Workforce Administration Lesson 1: Entering a New Hire

Discussion

The business process of hiring a new State of Tennessee employee begins with the personnel office receiving a recommendation for hire. In most cases, an interface will be used to load personal and job data information from Applicant Services into Edison. However, for certain actions (e.g., executive hires, rehires not currently in the Edison system, contingent workers, persons of interest, and most non-competitive employees), the person will have to be manually added to the database.

The 'Add a Person' business process involves all steps necessary to enter a person into the database manually. In this business process, the Agency HR Staff will enter information into Biographical Details, Contact Information, and Regional Pages. This business process also identifies a person as an employee, contingent worker, or person of interest. At this point, the user can choose to either save the Personal Data entered and return at a later time, or for such cases as executive hires and/or non-competitive employees, the user may continue on with entering the job-related new hire information into the system by choosing 'Employee' as the type of relationship and clicking the 'Add the Relationship' button. This takes the user to Job Data, where the 'Hire a Person' business process begins.

For those new hires whose personal information was entered and saved but not hired, or new hires that already existed as a non-payroll employee, there is a separate navigation to follow to process these hires. These steps are covered in the business process titled 'Hire a Person – New Employee Instance'.

In each case, there is the need to create and follow an online new hire checklist. Creating a checklist ensures that all necessary tasks are completed. Agency HR staff will be responsible for entering and completing the checklist. These steps will be covered in the 'View and Update a Checklist' business process.

For those new hires whose information was passed through the interface from Applicant Services, the 'Review Job Data' script will cover all of the relevant steps to review and validate all of the fields passed on the interface.

Key Notes

- Applicant Services will interface certain data elements for most State of Tennessee new hires.
- Executive Service employment information will normally be received from departmental management in paper format, and all data elements will be manually entered for Executive Service employees unless they previously existed within Edison.
- All state employees being hired will be entered into Edison with an 'Employee' Organizational Type. Contract workers interfaced to projects will be entered as 'Contingent Workers'. Under certain circumstances, volunteers will be entered as 'Persons of Interest'.
- The Non-Payroll population will be handled centrally through Benefits Administration.
- Employee Class will be populated in order for Benefits to properly administer Retirement.
- The need for a checklist may vary among agencies.
- The checklist items will default from the selected checklist. Checklist items can be added or deleted to meet each agencies requirements.
- After checklists have been created, the status of checklist items will be updated as items are completed or received.

- Checklist items will be created and maintained centrally. All checklists and checklist items will be initially configured by the Edison team. Agencies will notify DOHR when new checklists or additional checklist items need to be created.

Activities

1. *Adding a Person*
2. *Hire a Person*
3. *Hire a Person – New Employee Instance*
4. *View and Update a Checklist*
5. *Review Job Data*

Exercises

1. *Hire a Person*

Self-Assessment

1. *Add a Person*

Workforce Administration Lesson 2: Enter Additional Personal Information

Discussion

Entering additional personal information will encompass many different employee data elements including: emergency contacts, employment eligibility (I-9), and disability. This business process occurs when an employee's emergency contact, citizenship, or disability data requires an entry or change into the system. In addition, this lesson will cover how to modify a person on the personal data record once the personal information has already been entered and saved.

This lesson involves all the steps required to enter or change this additional personal information on the employee's record.

Key Notes

- Emergency contact information will be provided by the employee.
- For each new hire, HR will verify and enter citizenship information provided on the I-9 form. If an employee's citizenship data needs to be updated, HR will go to the 'Identification Data' link to update the 'Visa/Permit' and/or 'Passport data' pages.
- Verifying citizenship data will be a part of the new hire checklist. The new hire checklist will have a link to the pages to enter citizenship information.
- When notification is received that an employee has requested an accommodation, HR will enter the necessary information after verifying the request and notify the Supervisor that a visit to the employee's work site may occur.
- It is important that the business address is entered to ensure an employee's business location can be determined.

- Each agency should develop data entry standards for entering home and business addresses on the Personal Data record and verify they have entered valid home addresses through use of the USPS website.

Activities

1. *Emergency Contact Information*
2. *I-9 Information*
3. *ADA Accommodation Requests*
4. *Modify a Person*

Exercises

1. *Modify a Person*

Self-Assessment

1. *None*

Workforce Administration Lesson 3: Enter Additional Job Information

Discussion

This lesson involves all of the necessary steps to enter additional job information including tracking property, entering educational background information, and listing relevant licenses and certifications into Edison.

This business process includes integration with Payroll to track property issued and returned by an employee and the ability to collect for unreturned property. Payroll will query the data entered by Human Resources to determine if property was returned.

This business process also includes the ability to document educational background, including primary areas of study, and if a specific license or certification was obtained.

Key Notes

- HR will receive a form listing the property issued to an employee and will enter this information into the system. When an employee terminates, the list will be updated. From the updated list, Payroll will query the data to determine if an employee returned the assigned property.
- HR will monitor the return of company property upon termination. If an employee has property tracked by Asset Management, a general item will be used to track and indicate the return of property maintained within Asset Management.
- There will not be a conversion of Company Property.

- Entering Property information will be included as part of the New Hire Checklist, but since not all agencies use a checklist, alternative navigation to this page will be taught in this course.
- Entering Educational Background and Licenses and Certification information will be included as part of the new hire checklist, but since not all agencies use a checklist, alternative navigation to these pages will be taught in this course.
- Employee competencies will need to be updated during an employee's career for reasons such as: acquiring a new degree, acquiring a new certification or license, renewing a certification or license, and other work-related skills.
- If it is determined when reviewing the new competency (skill, etc.) a salary increase is needed, the business process of 'Job Data Update' will be used to give the employee a new salary based on the updated competency.
- Competencies entered or updated in HR will not update information in Applicant Services.

Activities

1. *Property*
2. *Educational Background*
3. *Licenses and Certifications*

Exercises

1. *None*

Self-Assessment

1. *None*

Workforce Administration Lesson 4: Entering Performance Reviews

Discussion

The business process of creating performance evaluation documents will be handled in five different ways. First, Job Performance Plans and Formal Performance Evaluation Documents will be created for career service Employees who are impacted by a personal action (new hire, promotions, demotions, reclassifications, career path changes or transfers from another agency for newly-hired employees). Most of these Employees will be serving a probationary period in which the probationary end date will be automatically calculated by the system. Agency Performance Evaluation Coordinators will create a Job Performance Plan and Probationary or Flex Performance Evaluation Document for all Employees impacted by the personnel actions listed above. The due dates for Job Performance Plans and Probationary or Flex Performance Evaluation Documents are created based on the probationary end date calculated by the system, thus creating an evaluation period with a start date and end date.

Second, Job Performance Plans and Formal Performance Evaluations will be created by the Agency Performance Evaluation Coordinators for non probationary career service Employees. For each of these employees, the Agency Performance Evaluation Coordinator will create Job

Performance Plans and Formal Performance Evaluation documents and set the Formal Performance Evaluation Document end date to the last day of February of the following year. These performance evaluations will typically be created in mass through a group identification process, which will be different for each agency.

Third, Job Performance Plans and Formal Performance Evaluations will be created by Agency Performance Evaluation Coordinators for career service Employees who have recently completed a Probationary or Flex evaluation period, and who have at least a 90 day period before reaching the next March 1 mass creation date for Job Performance Plans and Formal Performance Evaluation documents. The Formal Performance Evaluation end date will be set to the last day of February of the following year. These performance evaluations will be created either individually as Probationary or Flex Performance Evaluation Documents are approved by the Appointing Authority or in mass based upon the due date of the Probationary or Flex Performance Evaluation Documents.

Fourth, performance evaluation documents can be created in those instances where a supervisor completed a “paper” performance evaluation form for an employee. In this instance, the Agency Performance Evaluation Coordinator will create a Performance Evaluation Documentation Page in Edison (by selecting either a “paper annual”, “paper probationary” or “paper flex”) and record an overall rating and date of evaluation. This review will not need to workflow to management for approval as the original paper performance evaluation form approved by the Appointing Authority is considered the official performance evaluation document.

Fifth, Interim Work Reviews will be created and completed outside of Edison but the date of discussion and evaluation period will be recorded in Edison. This method of performance review will not be covered in this course.

This lesson involves all the steps required to create a Job Performance Plan and Formal Performance Evaluation Document for career service employees. The steps required when creating probationary, flex, or annual performance evaluation documents will be the same, differing only in the type of performance review selected from the drop down list and the period start and end dates. The process for creating a documentation page to record the discussion date for an Interim Work Review will be covered in ‘Manager Self Service’ training.

Key Notes

- As transactions are approved by DOHR, the Agency’s Performance Evaluation Coordinator will run a query to identify those employees who have probation dates greater than or equal to the current date. The Agency Performance Evaluation Coordinator will then create Job Performance Plans and Formal Performance Evaluation documents with beginning and end dates for those Employees identified in the query.
- New hires after the run date will be placed into the annual cycle manually.
- Agency Performance Evaluation Coordinators will be responsible for creating Job Performance Plans and Formal Performance Evaluation Documents for all Employees in their agency (Business Unit).
- Previous performance evaluation forms will not be converted to Edison.
- When an Employee transfers from one Business Unit to another, the losing Business Unit will navigate in Edison to Historical Documents, print off all of the Employee’s Formal Performance Evaluation Documents and place them in the paper version of the personnel file which will be sent to the gaining Business Unit.
- Agencies may elect to create performance evaluation documents for executive service employees within Edison.

Activities

1. *Creating Performance Reviews – New Hires*
2. *Creating Mass Performance Reviews*
3. *Creating Initial Annual Performance Evaluations*
4. *Paper Performance Reviews*
5. *Printing Historical Performance Documents for Transfers*

Exercises

1. *None*

Self-Assessment

1. *None*

Workforce Administration Lesson 5: Review Job History and Update Job Data

Discussion

Reviewing Job History is a business process that will be used frequently to inquire on employee job data. The 'Review Job History' business process taught in this lesson covers the steps to review what has occurred on an employee's job history. Users will be able to access the changes that have been made on an employee in Edison and use the Review Job History screen to complete various tasks.

All of the other activities in this lesson fall under the category of 'Updating Job Data'. 'Updating Job Data' will encompass many different areas including the update, change and approval, if required, of various personnel transactions. In this lesson we will cover the transactions of rehire, internal transfers, promotional transfers to an external agency, pay rate changes, terminations and retirements.

'Update Job Data' covers the transactions of existing employees only. Even though rehires are not typically active employees before being rehired, they will have historical personal information and job data record which will be covered under this lesson. Newly hired employees are covered in the 'Hire a Person' business process.

Key Notes

- When a user needs to review the job history of an employee they will first go to 'Review Job Information'. If the information in 'Review Job Information' is not sufficient, the user will proceed to 'Job Data' for further review. Not all users will have access to the 'Job Data' pages.
- The 'Updating Job Data' business process is started by requesting a change to 'Job Data' through a custom page. This allows agencies to request actions to be approved by DOHR prior to the actual entry to 'Job Data'. If the request requires an HR Administrator's approval, it will be saved and submitted after their review. The Originator will be notified via email when a transaction is approved.
- The DOHR Technical Services or DOHR Class/Comp Analyst will monitor the pending transactions daily. If a personnel action is approved, a component interface will post the

transaction to 'Job Data', and the Originator will be notified. If denied, the Originator will be notified.

- **Except for job share positions, the maximum number of employees per position should not exceed two**.
- No data will be interfaced back to the Applicant Services System.
- Retirement is the only action that will allow an employee to be terminated with pay and run out their annual leave.

Activities

1. *Review Job History/Job Data*
2. *Rehire*
3. *Transfer – Internal*
4. *Promotion – External Agency*
5. *Pay Rate Change*
6. *Termination*
7. *Terminal Leave*
8. *Retirement*

Exercises

1. *Transfer - External*
2. *Termination*

Self-Assessment

1. *Pay Rate Change*

Workforce Administration Lesson 6: Maintaining Position Records

Discussion

This lesson covers the business process for requesting a Position change. The position change process begins with a change request and goes through four levels of approval (Supervisor, HR Administrator, F&A Budget and Department of Human Resources). For the purposes of this course, only the business process to create the initial change request, approval by the Supervisor, and approval by the HR Administrator will be taught. The approval processes by F&A Budget will be maintained outside of the Edison system. The approval process by the Department of Human Resources will be covered in the Position Management course (HR 110).

This lesson will also cover the prerequisite step of entering the Job Group Code for running the Affirmative Action interface between the new Edison system and the current Affirmative Action Plan database. The interface will retrieve employee data such as EEO-4 job category, employee classification, location, department, division, job group code, race, and gender from the new Edison system and update the Affirmative Action Plan database. For the purposes of this course, we will not be teaching how to run the actual Affirmative Action interface, just the prerequisite requirements.

Key Notes

- When a Position Change is needed, HR will create a new occurrence for a position change. The request will be created by entering the position number (or blank if new position), an effective date, and the necessary fields relevant to the request the position change.

- The process of initiating a position change will become electronic. However, a paper salary administration will still need to be submitted to F&A Budget as part of the process. The agencies will have to manually submit the paperwork to F&A Budget for those requests requiring their approval.
- HR will maintain the Job Group Code in Edison by navigating to the custom page and entering the Job Group Code associated with each position.
- The Affirmative Action Plan database (DB2 system) will be moved off of the main frame to another client server system.
- Affirmative Action Plans will continue to be completed using the current Affirmative Action Plan database outside of the Edison system.
- There will be an interface from Edison to the Affirmative Action Plan database.

Activities

1. *Process Position Change Request*
2. *Enter Job Group Code for the Affirmative Action Plan*

Exercises

1. *None*

Self-Assessment

1. *Process Position Change Request*

Workforce Administration Lesson 7: Reports

Discussion

The Run Reports and Queries business process will be used frequently to develop and run queries and reports. Users, based on security, will be able to access and utilize queries and reports in Edison to complete their daily tasks. Other users will be designated with the task of developing and maintaining queries and reports to help meet the needs of the State and its users.

This lesson covers how to enter the Query tool to run an established query.

This lesson also covers the general instructions to run a report. Based upon the report being run, the user will be presented with a different run control page. The user will enter the required information and run the report.

Key Notes

- The navigation to run a report will vary.
- All roles with access to a report will be determined at the time the report is developed.
- Security will be designed to only allow access to employees to view/print reports for which they have access.

Activities

1. *Run Queries*
2. *HR Reports*

Exercises

1. *None*

Self-Assessment

1. *None*

Course Review with Questions and Comments

Questions and Comments

Evaluation